

Meeting Highlights

EPMO SDLC Workgroup

DAY: Friday, March 4th, 2011

TIME: 9:00 A.M. – 12:00 P.M.

LOCATION: Department of Insurance

(Dobbs Building, 430 N Salisbury Street, Raleigh, Conference Room 2238)

or Dial-In 919-420-1378

Meeting Called By:	SDLC Workgroup Members
Meeting Purpose:	Gain agreement on the recommended workflow for agile development projects over \$500K. EPMO discussion with Kathy Bromead, EPMO Director.
Attendees: (*present)	Chris Cline, Community Colleges Beau Garcia, Department of Insurance Gayle Robinson, Department of Insurance LaQuita Hudson, Information Technology Services Bill Kelly, Department of Revenue Arun Kumar, Department of Health & Human Services (over the phone) Subha Sridharan, Department of Health & Human Services Linda Lowe, Statewide Enterprise Project Management Office Gaye Mays, Statewide Enterprise Project Management Office Cheryl Ritter, Department of Transportation Carolyn Broadney, Department of Transportation
Guests:	Kathy Bromead, Statewide Enterprise Project Management Office

Discussion with Kathy Bromead on EPMO process:

- The discussion began with the issue of disconnect between the Project Management Advisors (PMA) group and Quality Assurance (QA) group.

Good changes are taking place in terms of how the QA office works with PMA. Kathy Bromead is working with her team to look at all the issues, working with QA team to categorize issues. This would help eliminate trivial issues and help look at issues that impact the project, scope, schedule, etc.

PMAs attend meetings related to projects but QA team members do not attend the project meetings. All the information from the meetings is not shared between PMA and QA. Sending agenda, meeting minutes does not help either. May be a quick conversation would work?

- If a milestone is missed, how does the Project Manager (PM) communicate? Maybe, the accomplishments/Plans for next period on the Status tab in the Project Portfolio Management (PPM) tool should be the area where the communications could be?

The Schedule tab in the PPM tool cannot be adjusted at this point. Atlanta has changed their model to Plan->Build->Run. This has reduced the number of their gates from 10 to 2. The phases and gates in North Carolina are based on the recommendations by Project Management Institute (PMI).

- Can the Status tab and Schedule tab in the PPM tool be adjusted based on Milestones? This needs improvements based on how it works currently.

The PPM tool has some limitations. Kathy Bromead thinks that the Schedule tracking process in the PPM tool needs improvement and she is open to suggestions or ideas to improve the same. Rob Pietras is using a tool for resource management. Expansion budget request included the request for tool, but the Governor's Budget did not include a new tool to replace PPM. Some divisions are using tools internally to track resources/time. DIRM uses Niku, DOT uses SAP for resource management. Some divisions are ready to use tools but some agencies are still not.

Linda Lowe has a copy of the PPM database taken at one point in time only that tracks milestones, this will allow us to check if =projects missed a milestone when the copy was taken only.

Kathy Bromead added that the initial thought was agencies were having issues with cost overruns but further analysis indicated that the issue was with schedule overruns. There is also no lockdown in the tool. Anything could be changed on the schedule tab. Rules are needed to be in place in the tool. Forecast date cannot be changed unless the schedule is re-baselined. The team put in what they could best at the time the tool and initial procedures were set up several years ago. EPMO does not want to add more rules that would increase work for agencies.

- Projects might have green jelly beans but the EPMO team knows that the project schedule will slip. We are following the process, but there could be slippage in the schedule that the tool does not include. Subjective view is missing in the tool. Team suggested adding another jelly bean that indicates a subjective PMA view of what's really going on.
- Kathy Bromead suggested that more training could be provided on CPM and schedule management. Free online tools could be used for project schedule but it is still a training issue.
- DOT uses a template internally for milestones. Teams could add more in the template but still need to complete the ones that are in the template. It might be helpful to include critical milestones for waterfall approach and agile.
- Information sharing about planning, knowledge area among agencies is not occurring today. If there is a requirement, it would be a good idea to check if solutions in other agencies could be leveraged. Generally, it is easier to get acknowledgement and approval from senior management if the solution comes from another state but it is difficult to get approval for the solutions from another NC agency.
- Project Managers could include summary within jelly beans, QA may not be able to read all documents under document management tab. In addition to adding information to the jelly beans, the PM can also call the QA person and make sure they are aware of it.
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- Keywords could be added in the tool so that the search could be done on keywords.
- Transparency in PPM tool to search for projects and applications – looking at Sharepoint collaboration tool to search, even create a word document with all the data and share data. The risk with the transparency is that if the project is entered in the tool with the cost when the RFP has not been posted. We should be cautious with what could be shared.
- Report – what is in the portfolio? What projects have been retired and why? How many of the projects are doing COTS? From the published application legacy report, the average age of legacy applications 9 to 10 ½ years. Plan to replace applications has decreased. We will need to investigate what systems could be replaced in the next 2 years.

- There is lot of challenges in vendor management within agencies which the tool does not capture. Kathy Bromead added that EPMO is doing lot of different things, need to communicate what we are doing and not add burden to agencies.
- The Change Management section in the Staffing plan - agencies are not using this section for change management. Kathy Bromead doesn't think OSBM is using it at all. Intent was to meet needs in a single spreadsheet for OSBM. Budget analysts in OSBM do not use PPM tool, the information in the tool is translated into spreadsheet and provided to the budget analysts. This takes a long time for the approval process.
- Change Requests— If the request for change includes schedule only, the internal agency reviewers can approve. Kathy Bromead can approve changes that involve PPM errors/corrections of internal staffing changes that increase the budget . But for other budget changes (beyond internal state FTEs), Kathy Bromead works with Sarah Porper at OSBM for approval.
- Linda Lowe added that she found the staffing plan very complex and cumbersome to use and wound up copying parts of it on a spreadsheet, and did not need all those tabs for a small project she did recently for CGIA.
- Kathy Bromead added that the Staffing plan would be best covered with Sarah Porper.
- DOT has internal processes that are addition to what EPMO requires. During the PPM training, the PM gets information different than the internal process and this has been a struggle for DOT. Agencies may have different levels of sign off or other process requirements that are agency specific. It may be a good idea to have agency PMO and EPMO PMA and QA present in training.

Mostly, PMAs are consistently being assigned to specific agencies; PMAs can be inconsistent when switching agencies due to change in internal process within agencies. PPM Training can be done for specific agency, if needed. It will be helpful if agency PMOs and/or project managers could document what is different at their agency from what is being told in PPM generic training. Kathy Bromead could assess which generic PPM training needs to be tweaked to insert agency PMO variations – either generic disclaimer or possible specific differences in agencies. Linda noted that the EPMO does offer agency-specific training and that the PMA can partner with the agency PMO to offer training that takes the agency processes into account.

- Could we include meeting minutes on the PPM website? Kathy Bromead – yes we can send them to Janet Stewart.
- There has been delay in project approvals – pretty much stoppage in the projects due to OSBM funding approvals. The project was on hold because of waiting for the approval, which is not in the radar of the PM. We need a way to document this in the tool.

PPM tool is not a budget tool. OSBM uses other budget tools but they are not open to share with other agencies. Information is flowing in different timelines, it takes time for budget office to analyze and approve. Federal funding impacts how the budget is spent.

How do we give all this information in one place? This will be question for Sarah Porper.

- Transition planning for O & M: O & M budget is not part of the project management, it is outside the project. Gaye Mayes to check the transition planning examples from the current project undergoing transition. How does DHHS do transition for O & M, Subha to follow up. How does the budget work for O & M? APM tool linkage is required for CIO reporting.

Discussion on proposed “Modular workflow” document:

- Initiation: No changes
- Planning & Design:
 - Include “Multiple Sprints” with Planning & Design. Agile is not geared towards month to month, but towards sprints.
 - Updated Sprint Plan (Schedule and Staff plan) – replace staff plan to burn down chart, Remove burn down chart from Agency document checklist.
 - Linda Lowe and Cheryl Ritter questioned Risk Management Plan and PM Plan – Beau Garcia would like to retain it. Add agile assessment going into Gate 1 and an updated agile assessment going into gate 2
- How do we control version of T ASD in the tool every time the document is updated. Team discussed if an automatic notification is needed when the T ASD is uploaded in the tool. Internal agency reviewer reviews the T ASD before ITS reviews it. The agency may not want to notify until they are ready.

- Project closeout – How do we know we delivered value when completing the project closeout document? How do we measure value in terms of business vs. In terms of state?

Change diagram to reflect “Project Closeout” report goes away and new “Project Retrospective” goes there. We will need a new template for “Project retrospective” that shows value delivery.

- Challenge – training all team members to think agile.
- We will include a survey to collect information on business owner closeout value.
- Business involvement in small agencies could be a challenge
- An assessment checklist is needed to determine if an organization/project can be agile or not. Kathy has an example that she is willing to share with the group.
- Monthly Status reporting still needs to occur. Ideally, sprints could be 2 or 4 weeks to more readily line up with status reporting.
- Agile means just enough documentation. Documentation does not go away.
- Agile – Do you have the resources available to procure, test and move to production? Multiple servers need to be in place. Do you already have dev/test and prod environment where you can work? If not, can the teams do Virtual/Cloud computing? If no, then guideline should be that the team shouldn’t do agile and will take too long to get servers in place.
- Can Charles change workflow in the PPM tool? Yes, he can create a brand new workflow for agile. Budget will break into 12 months.

- Future discussion: Can we allow the projects to go back to waterfall if agile is not working? What if you start down one path or the other and want to toggle over? It is too much of a game change for projects > 500K

- **Discussion Points for Next (April) Meeting**

- Meeting with Sarah Porper and Vicky Kumar based on their availability
- Can we allow the projects to go back to waterfall if agile is not working?
- Orientation of agile workflow?

ACTION ITEMS / NEXT STEPS			
No.	Item	Assigned To	Status
1.	Kathy will ask Charles if the PPM tool can be modified to capture agile sprints when tracking budget/costs for monthly reporting or if the PPM tool will allow PM to define each month by entering sprint start and end dates	Kathy	Complete
2.	Kathy will investigate whether hours on the PPM tool status tab can be eliminated since the burn-down chart could really suffice for the staffing plan.	Kathy	Open
3.	Review ITS service catalog and identify what is documented well, identify gaps (forms, flow, lead times, etc.) that are most painful to the agencies.	Linda/LaQuita	Open
4.	Plug any holes in service catalog identified by work group. Get standard provision time, forms, flows provided by service owners where gaps exist after initial gaps are identified.	Donna Spaulding (Brian's replacement)	Open
5.	Provide presentation on the process for hosting delivery and provisioning to workgroup	Donna Spaulding (Brian's replacement)	Open
6.	Share presentation materials and offer to conduct presentation to Sharon's groups (perhaps BRM and Service Delivery) regarding agile methodology and processes. Sharon will determine who hears what information and when.	Linda	Complete
7.	Research possible speakers for future meetings to help group gain more knowledge on Agile viability and scalability.	Linda & Ann	Open
8.	Share lifecycle with critical milestones for waterfall projects.	Kathy	Open
9.	Share Schedule database with Cheryl Ritter	Linda	Complete
10.	Provide Transition Plan examples from projects that are currently transitioning	Gaye Mayes	Open
11.	How is O&M transition being done within DHHS?	Subha	Open
12.	Send free scheduling tool information to the group	Beau	Complete

			<p>Project Management: Open Project http://openproj.org/ (includes critical path & resource mgmt)</p> <p>Network & Software diagramming: Dia http://live.gnome.org/Dia/Download</p>
13.	EPMO Standardize on whether or not to justify “No” responses on agency document checklist	Kathy	Open
14.	What phase would you use for most of the iterations/Sprints? E&B or Implementation? Research and make recommendations to the team.	Cheryl	Open